DAISEY
connecting the first five years to a lifetime of success

User Manual for Providers & Program Administrators

Table of Contents

1. Introduction to DAISEY
    a. What is DAISEY?
    b. About This User Manual

2. DAISEY Orientation
    a. Webpage
    b. Policy Statement
    c. Homepage
    d. My Profile
    e. Help
    f. Organizational Access

3. System Navigation
    a. Left Navigation Menu
    b. Search Grid Navigation

4. Caregiver Profiles
    a. What are Caregiver Profiles?
    b. Managing Caregiver Profiles
    c. Adding Primary Caregiver Profiles
    d. Adding Secondary Caregiver Profiles
    e. Editing a Caregiver Profile
    f. Deleting a Caregiver Profile

5. Child Profiles
    a. What are Child Profiles?
    b. Managing Child Profiles
    c. Adding Child Profiles
    d. Associating Child Profiles with Caregiver Profiles
    e. Editing Child Profiles
    f. Deleting Child Profiles

6. Family Activities
    a. What are Family Activities?
    b. Accessing Family Activities
    c. Adding Family Activities
    d. Editing Family Activities
    e. Deleting Family Activities
    f. Safety Mode Feature

7. Environment Profiles
    a. What is Environment Data?
    b. Managing Environment Profiles
    c. Adding New Environment Profiles
    d. Associating Children to Environment Profiles
    e. Editing Environment Profiles
    f. Deleting Environment Profiles

8. Environment Activities
    a. What are Environment Activities?
    b. Accessing Environment Activities
    c. Adding Environment Activities
    d. Editing Environment Activities
    e. Deleting Environment Activities

9. Data Management
    a. Importing Data to DAISEY
    b. Matching ID Numbers Using ID Reports

c. Downloading Data Templates for Import
d. Importing Completed Data Templates
e. Creating New Profiles Using Import
f. Updating Profiles Using Import
g. List of Common Import Errors
h. Exporting Data
i. Generating Intelligent Reports

DAISEY Data Governance and Security Statement

1. Introduction to DAISEY

1a. What is DAISEY?

DAISEY stands for "**D**ata **A**pplication and **I**ntegration **S**olutions for the **E**arly **Y**ears". DAISEY is a secure HIPAA-compliant web-based outcome reporting system developed by the University of Kansas Center for Public Partnerships and Research. Its primary purpose is to support early childhood programs to collect and report on child and family outcomes. It is licensed to funders or users who are interested in building data system capacity to demonstrate the success of early childhood programming.

1b. About This User Manual

Welcome to the DAISEY User Manual for Provider and Program Admin users. This manual is intended to help users navigate DAISEY, successfully perform all of its functions, and manage program data within this online system.

Please note that all data shown in the screenshots for this manual were fabricated for training purposes. These are not real families, environments, or data.

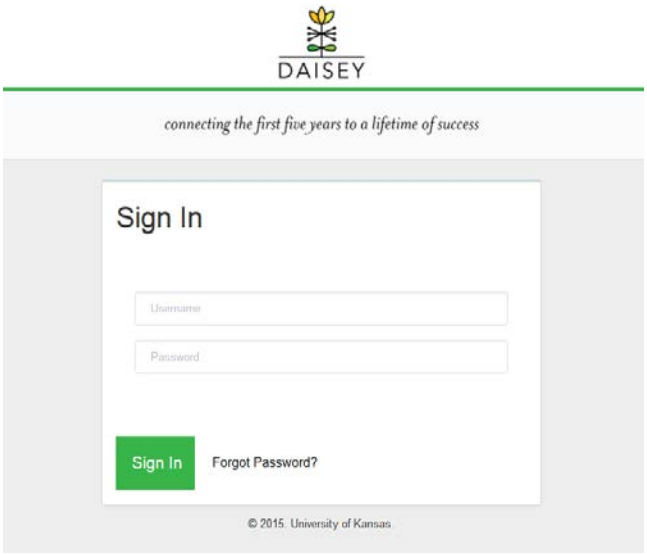
2. DAISEY Orientation

2a. Webpage

To use the system, visit http://daisey.cete.us (**Figure *1***). Users must have a valid login before entering the site.

- Enter username and password.
- Press *Sign In*.
- Users may also click *Forgot Password?* to be redirected to a help page to reset his or her DAISEY password.

Figure 1: Login Screen



Note: DAISEY usernames and passwords are case-sensitive.

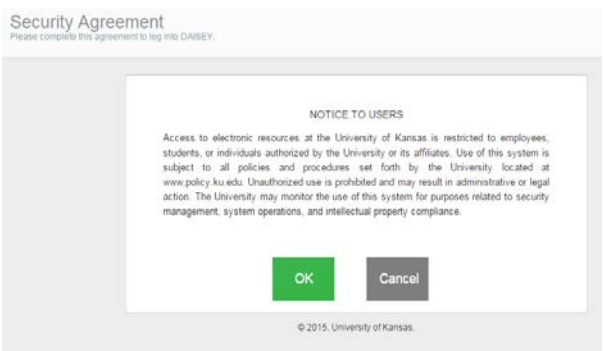
Note: For best results, users should use Mozilla Firefox or Google Chrome when logging into DAISEY.

Note: DAISEY users are automatically logged off after 30 minutes of inactivity.

2b. Policy Statement

Users will see this policy statement each time logging in. (**Figure *2***). All users of the DAISEY system must adhere to the guidelines of University of Kansas (KU) policies and procedures. For more information, see the *DAISEY Data Governance and Security Statement* at the end of this manual.

Figure 2: Policy Statement

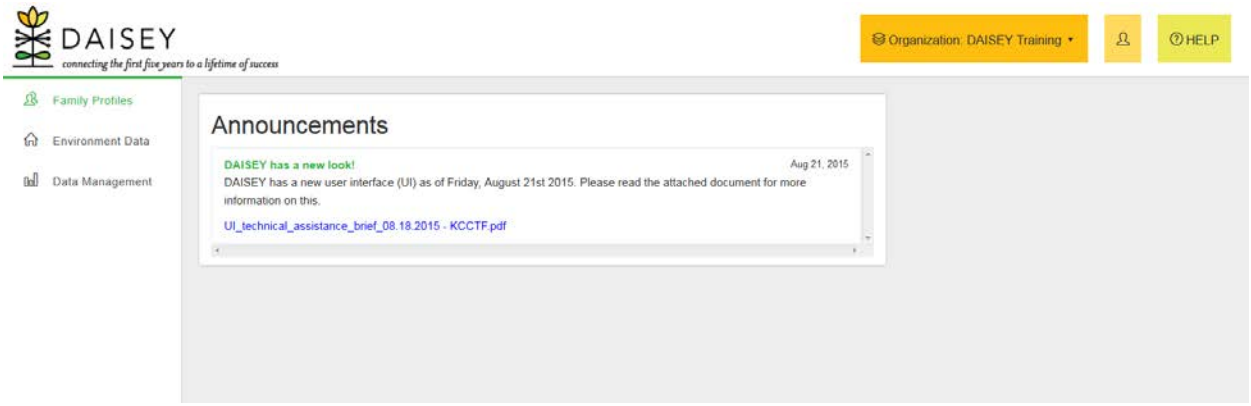

Security Agreement
Please complete this agreement to log into DAISEY.
NOTICE TO USERS
Access to electronic resources at the University of Kansas is restricted to employees, students, or individuals authorized by the University or its affiliates. Use of this system is subject to all policies and procedures set forth by the University located at www.policy.ku.edu. Unauthorized use is prohibited and may result in administrative or legal action. The University may monitor the use of this system for purposes related to security management, system operations, and intellectual property compliance.
OK
Cancel
© 2015. University of Kansas.

- To continue to the site, press *OK*.
- Pressing *Cancel* will redirect users to the login screen.

2c. Homepage

Once logged in, users begin at the DAISEY homepage (**Figure *3***). From here, users navigate the system using the left navigation menu. Links in the top-right corner allow users to check organizational access, modify their account using *My Profile*, and/or access *Help*. System announcements are also displayed on the homepage.

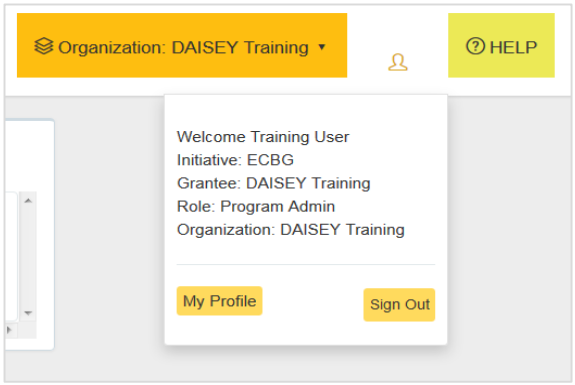
Figure 3: Homepage

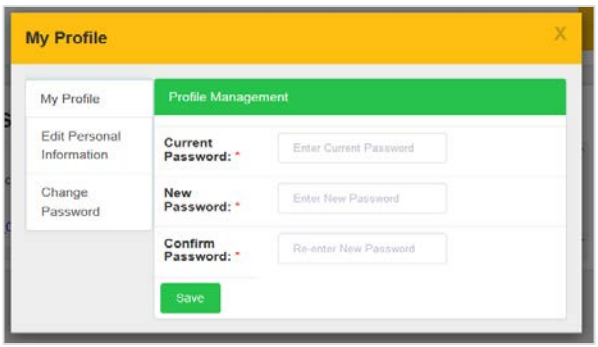

DAISEY
connecting the first five years to a lifetime of success
Organization: DAISEY Training
HELP
Family Profiles
Environment Data
Data Management
Announcements
DAISEY has a new look!
Aug 21, 2015
DAISEY has a new user interface (UI) as of Friday, August 21st 2015. Please read the attached document for more information on this.
UI_technical_assistance_brief_08.18.2015 - KCCTF.pdf

2d. My Profile

Access *My Profile* by clicking the profile icon in the upper right-hand corner (**Figure *4***). Click *My Profile* to edit user's first name, last name, or password. Click *Sign Out* to log out of DAISEY immediately.

Figure 4: My Profile



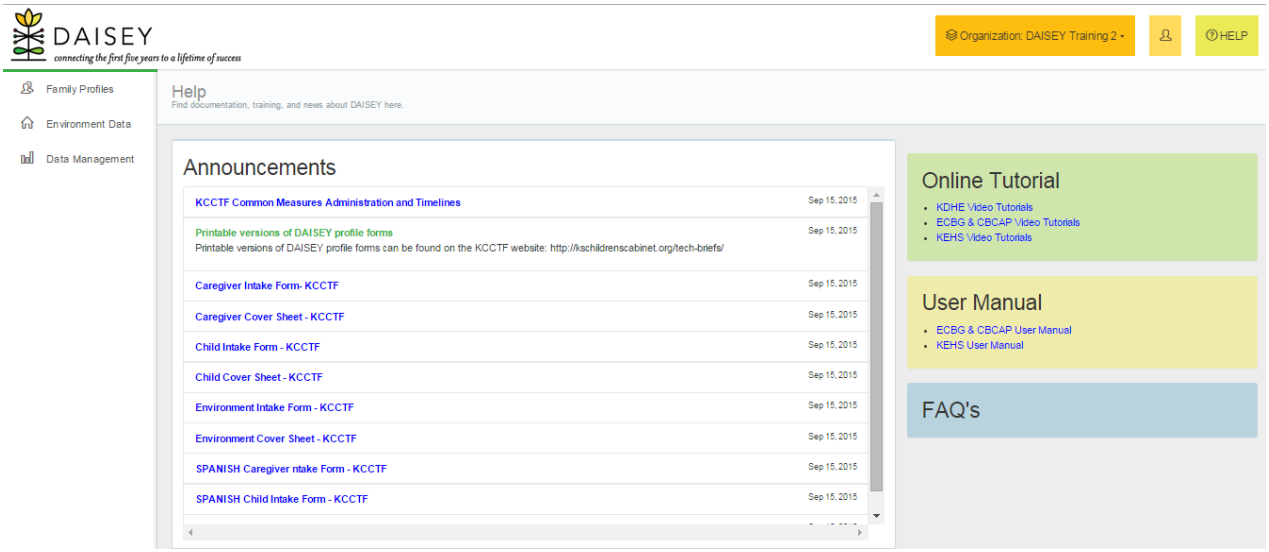


Note: Users are automatically logged out after 30 minutes of inactivity. However, for data security purposes, it is recommended that all users log out as soon as they are finished using the DAISEY system.

2e. Help

The *Help* screen (**Figure *5***) allows users to access materials to assist in using DAISEY: announcements, video tutorials, FAQs, and the most updated version of user manuals. If further assistance is needed after visiting the *Help* screen, please email daiseyadmin@ku.edu.

Figure 5: Help Screen

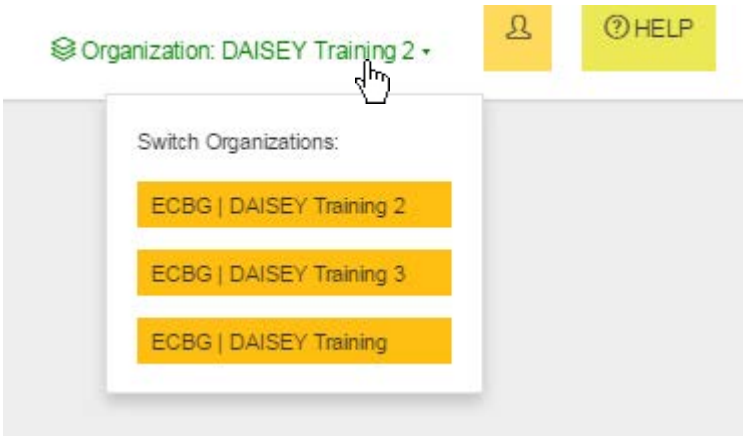

DAISEY
connecting the first five years to a lifetime of success
Organization: DAISEY Training 2
HELP
Family Profiles
Environment Data
Data Management
Help
Find documentation, training, and news about DAISEY here.
Announcements
KCCTF Common Measures Administration and Timelines
Sep 15, 2015
Printable versions of DAISEY profile forms
Printable versions of DAISEY profile forms can be found on the KCCTF website: http://kschildrenscabinet.org/tech-briefs/
Sep 15, 2015
Caregiver Intake Form- KCCTF
Caregiver Cover Sheet - KCCTF
Child Intake Form - KCCTF
Child Cover Sheet - KCCTF
Environment Intake Form - KCCTF
Environment Cover Sheet - KCCTF
SPANISH Caregiver ntake Form - KCCTF
SPANISH Child Intake Form - KCCTF
Online Tutorial
KDHE Video Tutorials
ECBG & CBCAP Video Tutorials
KEHS Video Tutorials
User Manual
ECBG & CBCAP User Manual
KEHS User Manual
FAQ's

2f. Organizational Access

Before entering any data, users should always check organizational access. Near the top right corner of DAISEY, users will see an orange rectangle that displays the name of the organization that user is logged in under.

Some users have the ability to switch access between multiple organizations. In such cases, this orange rectangle acts as a drop-down menu. Users may click on the organization button to switch to a different organization (see **Figure *6***). Simply click another organization listed to complete the switch.

Figure 6: Switching Organizational Access

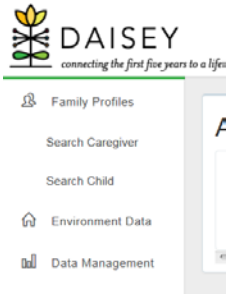


3. System Navigation

3a. Left Navigation Menu

A navigation menu appears on the left side of each DAISEY webpage. This menu contains 3 options: *Family Profiles, Environment Data,* and *Data Management.*

Figure 7: Left Navigation Menu Links



Family Profiles is used to navigate to and manage all child and caregiver profiles, as well as associated activity data. All form data collected at the level of the individual or family can be entered and viewed here. Menu links include *Search Caregiver* and *Search Child*.

Environment Data is used to navigate to and manage all environment profiles, as well as associated activity data. All form data collected at the level of the environment (i.e. group of children such as daycare or classroom) can be entered and viewed here. Menu links include *Search Environment Data*.

Data Management is used to import multiple forms of data, export data that has been entered into DAISEY, and view reports that summarize data entered into DAISEY. Menu links include *Import*, *Export*, and *Intelligent Reports*.

3b. Search Grid Navigation

While navigating the DAISEY system, it is often necessary to navigate various search grids (e.g lists of caregivers, children, forms). Below are tips for easier navigation and use of such search grids.

Figure 8: Sorting by Child ID

Sorting: To sort a search grid by any field, click on the header of that field column.

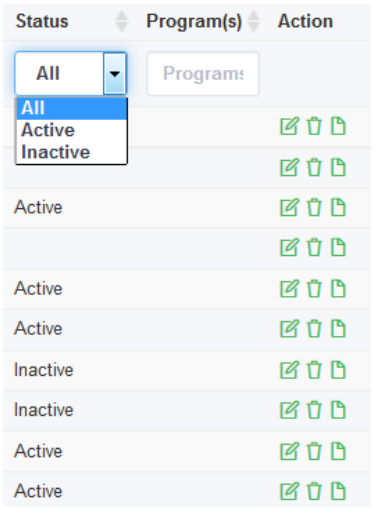
Sorting example: To sort a child grid by Child ID, click on *Child ID* header at the top of that column (**Figure *8***). A blue triangle appears pointing up, which indicates that the children are now sorted by Child ID in ascending order. To sort in descending order, click *Child ID* again (note: blue triangle will point down).

Searching: To search a grid by any field, enter the text to search for in the search box at the top of that field column. There is also now a general search box near the top-right side of each search grid.

Figure 9: Searching by caregiver last name

Searching example: To search for a caregiver with the last name "Smith" in the *Search Caregiver* grid, type "Smith" in the text entry box directly under the column heading *Last Name*. The grid will now only contain caregivers with a last name that begins with "Smith" (**Figure *9***).

Figure 10: Drop-down Sorting



Drop-Down Sorting: Columns that have limited possible entries use a drop-down box for sorting. For these columns (such as the Status column in **Figure *10***), simply select the criteria to sort by from the drop-down box.

Figure 11: Page navigation

Page Navigation: Search grids visually by using the page navigation bar at the bottom of the grid (**Figure *11***). Use arrow buttons to skip forward or backward by page, or type in desired page number. Users may also choose how many entries to see on each page of a search grid.

Zooming In/Out: If search grids are not aligned well on screen (e.g. all the columns of a table do not fit on the screen), adjusting the browser zoom may help. Check the web browser menu for a zoom function.

Keyboard shortcuts are another way to zoom in or out:
Zooming in Windows: *hold Ctrl and press* - to zoom out, or *hold Ctrl and press* + to zoom in.
Zooming on a Mac: *hold Command and press* - to zoom out, or *hold Command and press* + to zoom in.

4. Caregiver Profiles

4a. What are Caregiver Profiles?

Caregiver profiles are records DAISEY users create for each adult that is receiving services from the organization. The caregiver may be receiving services directly from the organization or be the guardian of a child who receives services. Caregiver profiles include demographic information about the adult. Each caregiver profile is designated as ”primary” or “secondary”. In DAISEY, all adults and children in a family are connected through a single primary caregiver profile.

Note: Although a DAISEY caregiver is often a parent or guardian, a caregiver may be any adult who is receiving services from your organization; A caregiver profile can exist in DAISEY without being tied to a child profile.

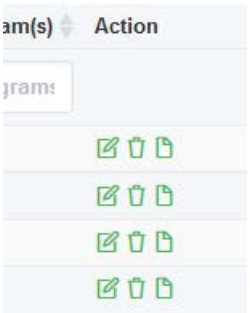
4b. Managing Caregiver Profiles

The *Search Caregiver* link is found under *Family Profiles* on the left navigation menu. This page contains a search grid of caregiver profiles created by DAISEY users.

In the *Search Caregivers* grid, each row contains information specific to that caregiver:

- *Caregiver ID*: the ID number of the caregiver automatically generated by DAISEY
    - Click the *Caregiver ID* to open the *Family Activities Page* for that caregiver. (See section 6 for more on *Family Activities*.)
- *Alternate ID*: the number an organization has assigned to the caregiver;
- *Last Name* and *First Name* of the caregiver.
- *Enrollment Date*: the date the caregiver began receiving services at this organization.
- *Caregiver Status*: whether the caregiver is the “primary” caregiver (i.e. “yes” = primary).
- *Program(s):* program(s) a caregiver is associated with.
- *Action*: clickable icons allow users to perform certain actions:
    - View or edit a caregiver profile by clicking the pencil icon.
    - Delete caregiver profile by clicking the trashcan icon. Not recommended (See section 4f).
    - View the “form history” by clicking on the paper icon (i.e. see when edits were made and by which user).

Figure 12: Action Column



4c. Adding Primary Caregiver Profiles

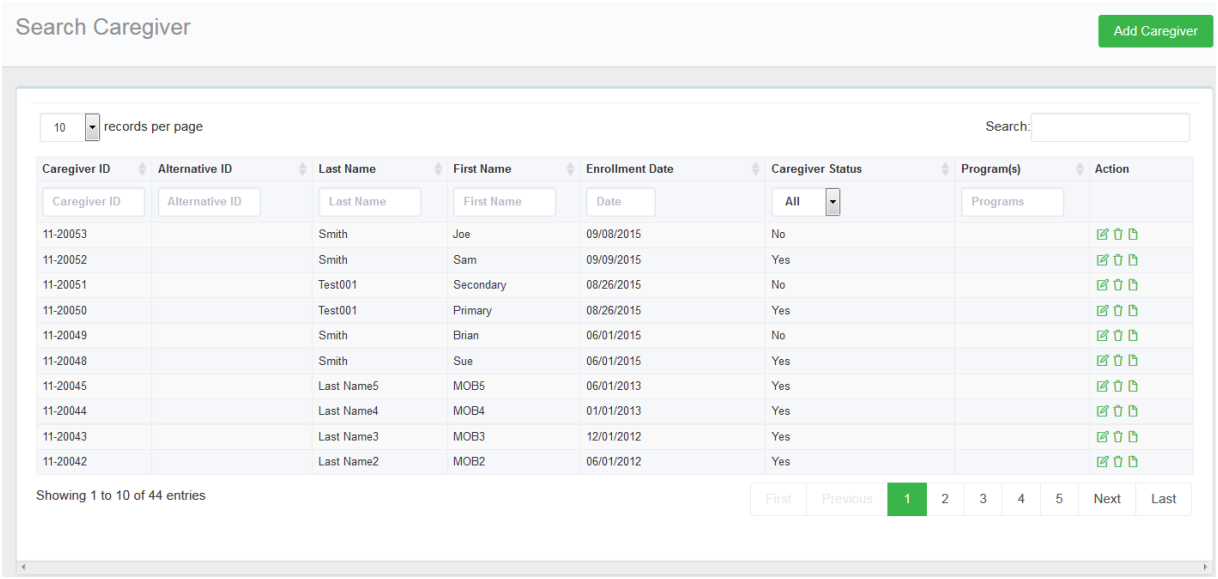
A caregiver is an adult who is either receiving services directly or cares for a child who is receiving services. Although using the term "caregiver" implies there is a child involved, caregivers do not need to be associated to any children. This is simply the term used to denote an adult profile in DAISEY.

Note: Before you create a new profile, browse or search for the caregiver to see if a profile has already been created.

To add a new primary caregiver profile:

- Click *Family Profiles* in the left navigation menu.
- Click *Search Caregiver*.
- Near the top-right corner of the search grid, click the *Add Caregiver* button (**Figure *13***).

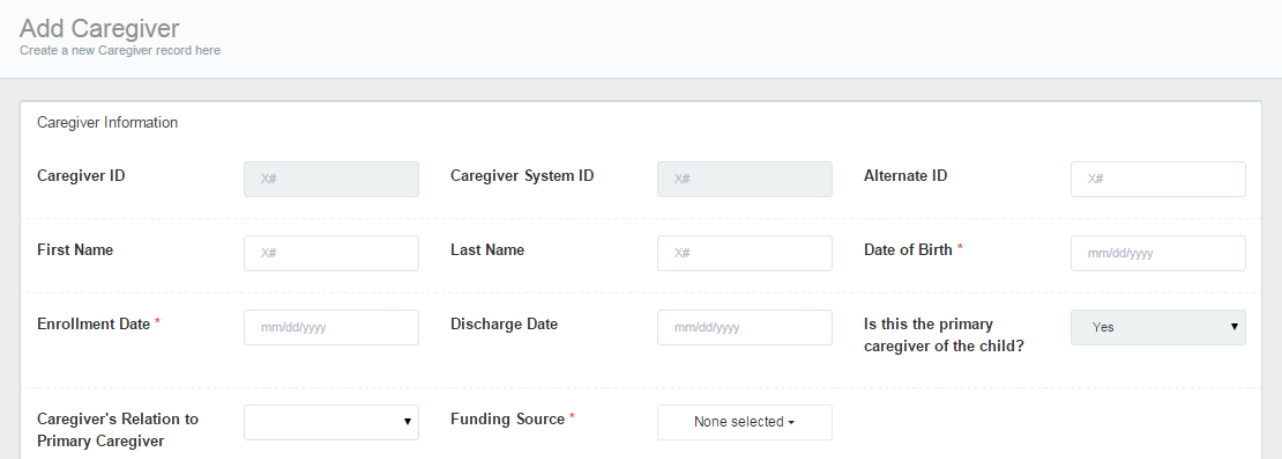
Figure 13: Search Caregiver grid



- A blank caregiver profile form appears (**Figure *14***). Note that an organization's caregiver profile may contain different questions from those shown in **Figure *14***.
- Fill in all information collected on the caregiver.

Note: Users *must* add the primary caregiver in the household first, before adding secondary or other caregivers in a household. The drop-down menu for the question *Is this the primary caregiver of the child?* is automatically set to "yes" when adding a new caregiver. If adding other caregivers in the household, see section 4d.

Figure 14: Add New Caregiver Information Fields



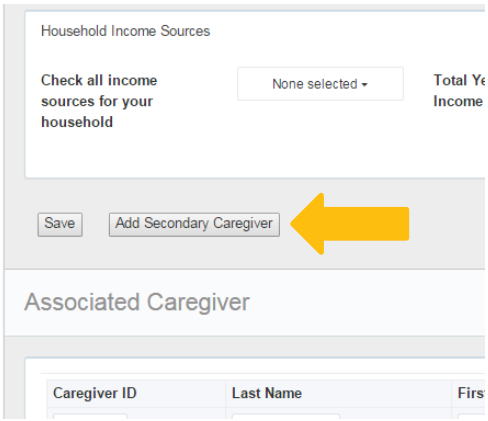
- Mandatory fields are marked with an asterisk (*) and must be filled in in order to save the caregiver profile. Please note that each organization may have data collection requirements above and beyond those mandatory fields.
- Once all information is entered, click *Save* near the bottom of the page. An alert box will pop up that reads: "Successfully saved caregiver with ID" followed by the automatically generated caregiver ID.
- Click *OK.*

4d. Adding Secondary Caregiver Profiles

To add a new secondary caregiver profile:

- Click *Family Profiles* in the left navigation menu.
- Click *Search Caregiver*.
- Locate the primary caregiver of the household this secondary caregiver will be associated to.
- Click the pencil icon (*Edit*) under the *Action* column.
- Click the *Add Secondary Caregiver* button near the bottom of the page (**Figure *15***).
- Rather than being directed to a new page, the demographic information fields on the current page will go blank.
- Fill in all information collected on the secondary caregiver.

Figure 15: Add Secondary Caregiver Button



Note: The drop-down menu for the question "Is this the primary caregiver of the child?" is automatically set to "No".

- Mandatory fields are marked with an asterisk (*) and must be filled in in order to save the caregiver profile. Please note that each organization may have data collection requirements above and beyond those mandatory fields.
- Once all information is entered, click *Save* near the bottom of the page. An alert box will pop up that reads: "Successfully saved caregiver with ID" followed by the automatically generated caregiver ID.
- Click *OK.*

Note: When saving a new Secondary Caregiver, be careful to hit the *Save* button and not the *Add Secondary Caregiver* button (again), which will clear the form again.

4e. Editing a Caregiver Profile

To edit a caregiver profile:

- Click *Family Profiles* in the left navigation menu.
- Click *Search Caregiver*.
- Locate caregiver profile to edit.
- Click the pencil icon in the *Action* column.
- Make changes.
- Click *Save* near the bottom of the page.

4f. Deleting a Caregiver Profile

Note: Deleting is not recommended. Do not delete a profile if connected to any Family Activity data. Profiles created accidentally may be deleted (e.g. a duplicate).

To delete a caregiver profile:

- Click *Family Profiles* in the left navigation menu.
- Click *Search Caregiver*.
- Locate caregiver profile to delete.
- Click the trashcan icon in the *Action* column.
- A prompt will appear that asks "Are you sure you want to Delete the selected form"?
- Click *OK* to confirm and delete. Or, click *Cancel* to cancel the deletion.

5. Child Profiles

5a. What are Child Profiles?

Child profiles are records DAISEY users create for each child that is associated with an organization. Child profiles include demographic information about the child. Child profiles can be linked to caregiver profiles in the system.

5b. Managing Child Profiles

The *Search Child* link is found under *Family Profiles* on the left navigation menu. This page contains a search grid of child profiles created by DAISEY users.

In the *Search Child* grid, each row contains information specific to that child:

- *Child ID*: the ID number of the child automatically generated by DAISEY.
    - Click the *Child ID* to open the *Family Activities Page* for that child. (See section 6 for more on *Family Activities*.)
- *Alternate ID*: the number an organization has assigned to the child.
- *Child Last Name* and *Child First Name*.
- *Caregiver ID*: the DAISEY *Caregiver ID* of the associated primary caregiver.
- *Caregiver First Name* and *Caregiver Last Name* of the associated primary caregiver.
- *Enrollment Date*: the date the child began receiving services
- *Status:* whether or not the child is actively receiving services.
- *Program(s):* program(s) a child is associated with.
- *Action*: clickable icons allow users to perform certain actions:
    - View or edit a child profile by clicking the pencil icon.
    - Delete child profile by clicking the trashcan icon. Not recommended (See section 5f).
    - View the "form history" by clicking on the paper icon (i.e. when edits were made and by which user).

Figure 16: Action Column

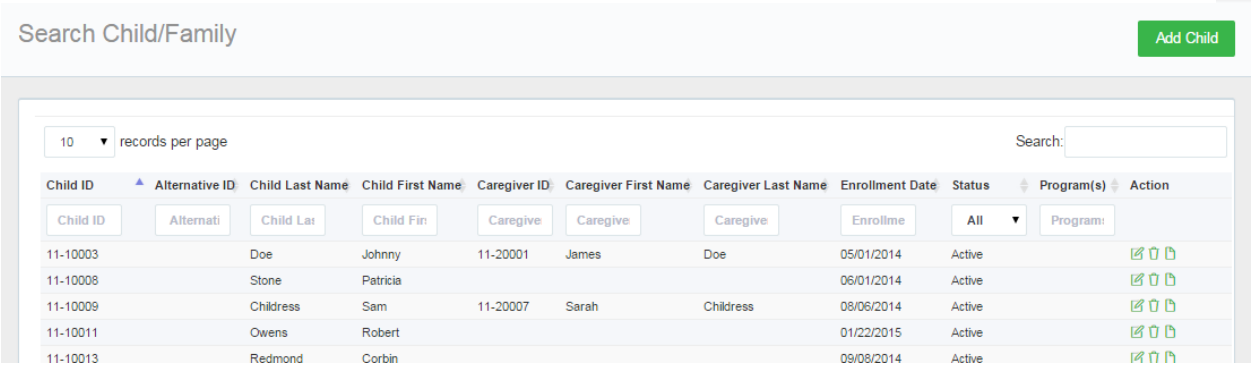
5c. Adding Child Profiles

Note: Browse or search for the child's name to see if a profile has already been created.

To add a new child profile:

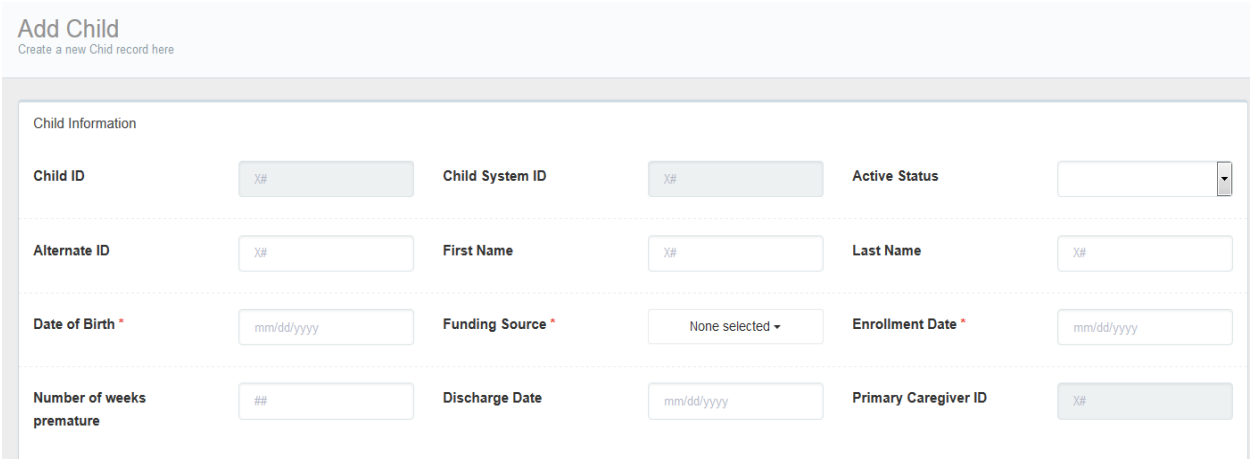
- Click *Family Profiles* in the left navigation menu.
- Click *Search Child.*
- Near the top-right corner of the search grid, click the *Add Child* button (**Figure *17***).

Figure 17: Search Child Grid



- A blank child profile form appears (**Figure *18***). Note that an organization's caregiver profile may contain different questions from those shown in **Figure *18***.

Figure 18: Add Child Profile Page



- Fill in all information collected on the child.
- Mandatory fields are marked with an asterisk (*) and must be filled in in order to save the child profile. Please note that each organization may have data collection requirements above and beyond those mandatory fields.
- Once all information is entered, click *Save* near the bottom of the page. An alert box will pop up that reads: "Successfully saved child with ID" followed by the automatically generated child ID.
- Click *OK.*

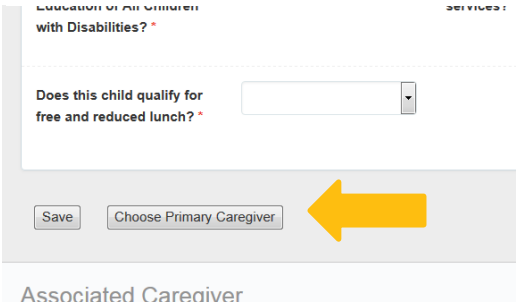
5d. Associating Child Profiles with Caregiver Profiles

Note: All child and caregiver profiles are associated to a family in DAISEY through one primary caregiver profile.

To associate a child profile with an existing primary caregiver profile:

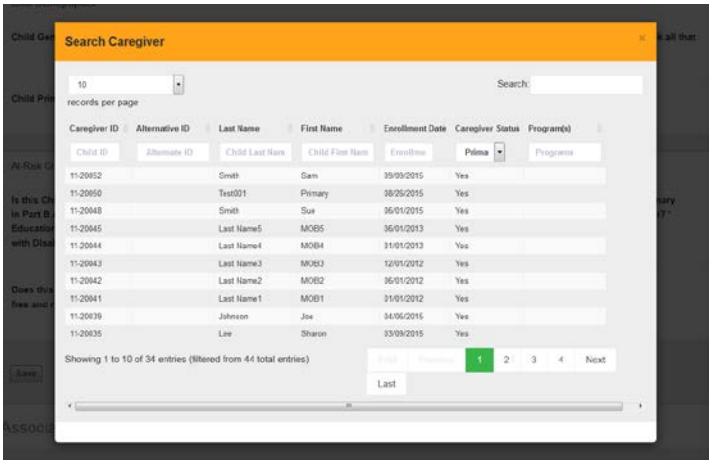
- Click *Family Profiles* in the left navigation menu.
- Click *Search Child.*
- Locate the child profile to be associated a primary caregiver.
- Click the pencil icon (*Edit*) under the *Action* column.
- Near the bottom of the page, above the "Associated Caregiver" section and next to the *Save* button, click the button that says *Choose Primary Caregiver* (**Figure *19***).

Figure 19: Choose Primary Caregiver



- A list of all the existing primary caregivers for this organization will appear (**Figure *20***).
- Locate the primary caregiver for this child profile. Click the *Caregiver ID* to create the association.
- The caregiver will appear in the *Associated Caregiver* table at the bottom of the page, along with any associated secondary caregivers.
- Click *Save.*

Figure 20: Existing Caregiver List: Associating Child Profiles



Note: If the wrong primary caregiver was accidentally selected, simply repeat the above steps. Click on the correct *Caregiver ID* and then *Save.* Users may remove the primary caregiver by clicking the trash icon can next to the caregiver in the *Associated Caregiver* table at the bottom of the child profile.

5e. Editing Child Profiles

To edit a child profile:

- Click *Family Profiles* in the left navigation menu.
- Click *Search Child*.
- Locate child profile to edit.
- Click the pencil icon in the *Action* column.
- Make changes.
- Click *Save* near the bottom of the page.

5f. Deleting Child Profiles

Note: Deleting is not recommended. Do not delete a profile if connected to any Family Activity data. Profiles created accidentally may be deleted (e.g. a duplicate).

To delete a child profile:

- Click *Family Profiles* in the left navigation menu.
- Click *Search Child*.
- Locate child profile to delete.
- Click the trashcan icon in the *Action* column.
- A prompt will appear that asks “Are you sure you want to Delete the selected form?”
- Click *OK* to confirm and delete. Or, click *Cancel* to cancel the deletion.

6. Family Activities

6a. What are Family Activities?

Family Activities are data forms that are attached to child and/or caregiver records. Within *Family Activities*, users can view all children and/or caregivers in a family, access available program forms for submission of collected data, and view a history of saved or submitted forms. Forms available will vary between organizations.

6b. Accessing Family Activities

The *Family Activities Page* can be accessed through both the *Search Child* and *Search Caregiver* menu links under *Family Profiles* in the left navigation menu.

Navigate to the *Family Activities Page* through the *Search Child* grid:

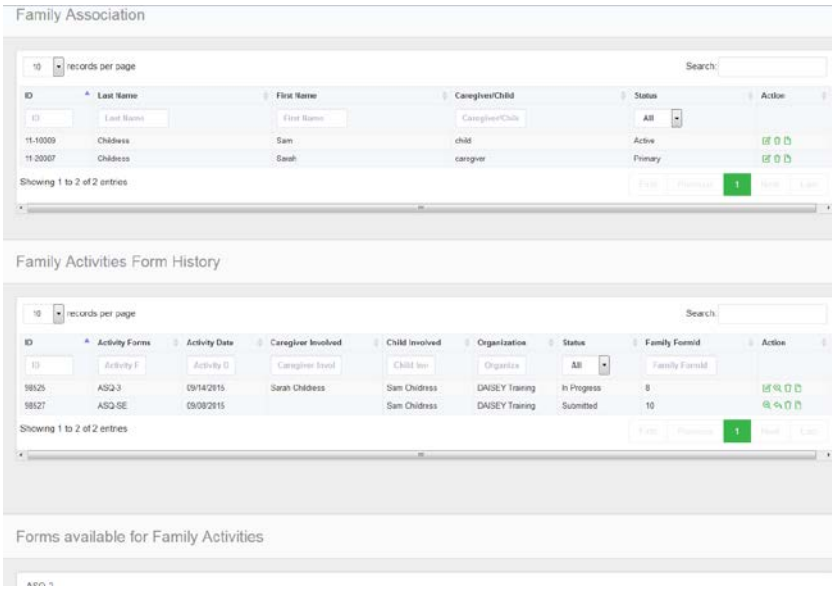
- Click *Family Profiles* in the left navigation menu.
- Click *Search Child*.
- Locate any child profile associated with the family in DAISEY.
- Click the *Child ID*.

Navigate to the *Family Activities Page* through the *Search Caregiver* grid:

- Click *Family Profiles* in the left navigation menu.
- Click *Search Caregiver*.
- Locate any caregiver profile associated with the family in DAISEY.
- Click the *Caregiver ID*.

Users will be redirected to a Family Activities Page with 3 sections: *Family Association*, *Family Activities Form History*, and *Forms Available for Family Activities*. (**Figure *21***)

Figure 21: Family Activities Page

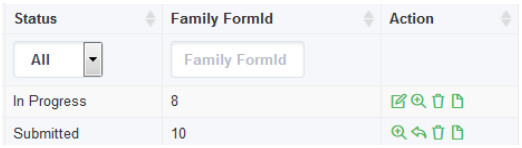


The *Family Association* grid shows all child and caregiver profiles linked to the family through the same primary caregiver profile.

In the *Family Activities Form History* grid, each row contains information specific to a form filled out for at least one member of this family:

- *ID:* A DAISEY ID generated for this specific form.
- *Activity Forms*: the name of the activity form entered.
- *Activity Date*: the date the activity occurred (i.e. when the data was gathered).
- *Caregiver Involved*: the caregiver named on the form.
- *Child Involved*: the child named on the form.
- *Organization*: the name of the organization of the user that entered data into the form.
- *Status*: whether the form has been "Submitted" or is still "In Progress".
- *Family Form* ID: the ID number assigned to the activity form.
- *Action*: clickable icons allow users to perform certain actions:
    - View a form my clicking the magnifying glass icon. (Only an option for submitted forms.)
    - Edit a form by clicking the pencil icon. (Only an option for forms in progress.)
    - Revert a submitted form back to "in progress" for editing by clicking the arrow icon. (Not an option for Provider-level users.)
    - Delete the form by clicking the trashcan icon. Not recommended (See section 6e).
    - View the "form history" by clicking on the paper icon (i.e. when edits were made and by which user).

Figure 22: Action Column Commands: Edit



6c. Adding Family Activities

To add a family activity form:

- Follow the instructions in section 6b to access the *Family Activities Page*.
- Click the name of the form to add from those listed in the *Forms Available for Family Activities* section. The forms available will vary between organizations.
- A blank form will appear.

Note: Some new forms may not be completely blank if the "**autofill**" feature is enabled. This will fill in commonly repeated information from the last time this form was filled out for this family. Users do not have control over the enabling/disabling of autofill.

- Fill in all collected data.
- Click *Save* to save data as "in progress" and continue working on the form; **OR**
- Click *Submit* if the information is correct and ready to be fully submitted.
- Once *Submit* is clicked, users are redirected to the *Family Activities Page*. In the *Family Activities Form History* grid, the recently-created form will appear.

Note: Users with the Provider role in DAISEY are unable to revert a form once submitted. Users with the Program Admin role are able to revert form status for editing if needed.

6d. Editing Family Activities

To edit a family activity form:

- Follow the instructions in section 6b to access the *Family Activities Page*.
- Locate the activity form to edit in the *Family Activities Form History* section.

Note: Submitted forms cannot be edited and must first be reverted to "in progress".

- Click the pencil icon in the *Action* column.
- Make changes.
- Click *Save* to save data as "in progress" (i.e. incomplete); **OR**
- Click *Submit* if the information is correct and ready to be fully submitted.

6e. Deleting Family Activities

Note: Deleting is not recommended. Forms created accidentally may be deleted.

To delete a family activity form:

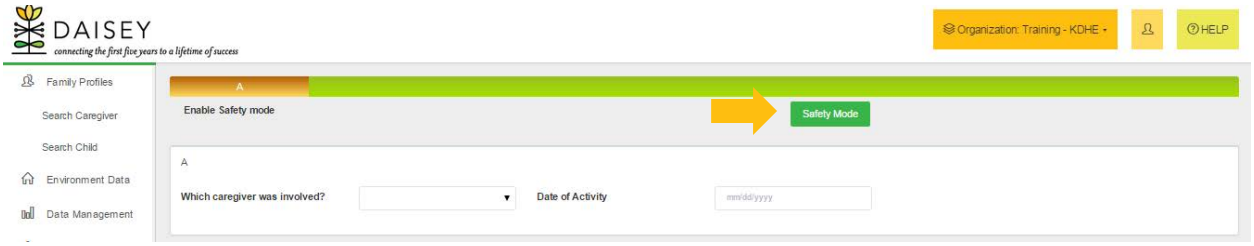
- Follow the instructions in section 6b to access the *Family Activities Page*.
- Locate the activity form to delete in the *Family Activities Form History* section.
- Click the trashcan icon in the *Action* column.
- A prompt will appear that asks "Are you sure you want to Delete the selected form"?
- Click *OK* to confirm and delete; **OR** click *Cancel* to cancel the deletion.

6f. Safety Mode Feature

Note: Not all organizations have forms with the safety mode feature added.

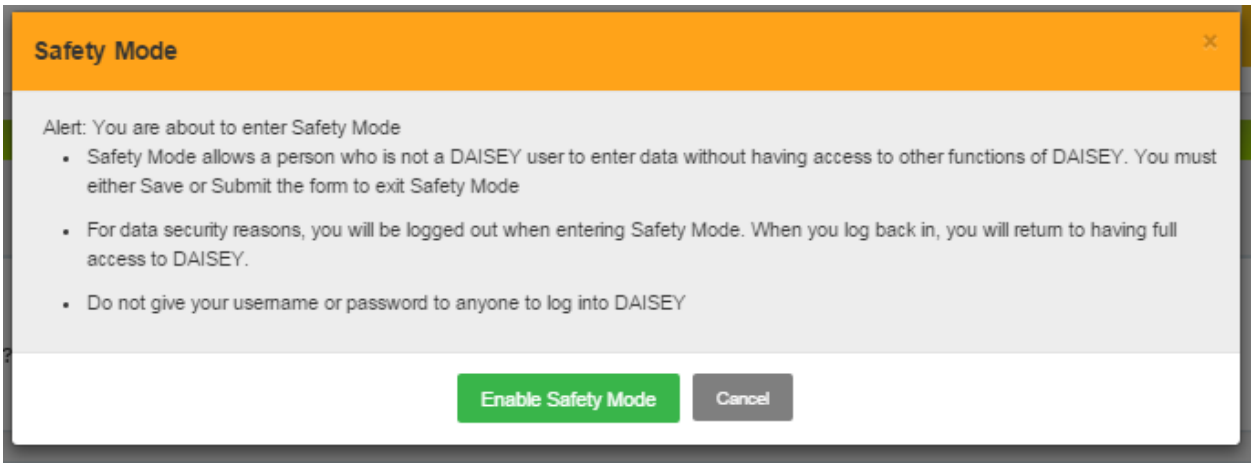
Safety mode provides a way to allow non-DAISEY users (e.g. clients or caregivers of clients) to directly enter data into DAISEY without compromising the security of other data in DAISEY. If the safety mode feature has been added to a form, a green *Safety Mode* button will appear (**Figure *23***). To enable safety mode for this form, click that button.

Figure 23: Example of Form with Safety Mode Feature



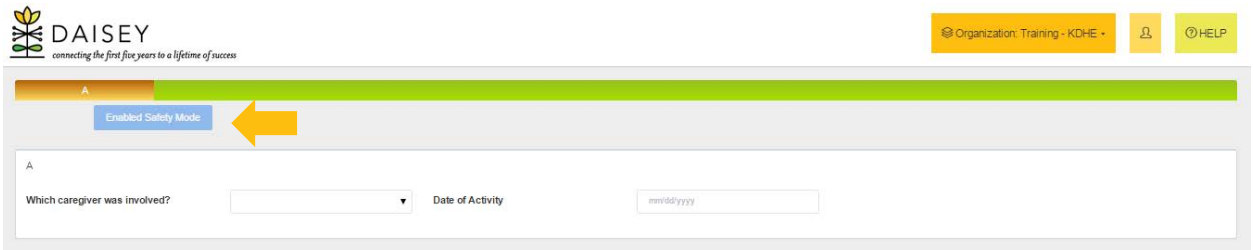
After clicking the *Safety Mode* button, an alert box will appear on the screen (**Figure *24***). Click *Enable Safety Mode* to continue. Click *Cancel* to return.

Figure 24: Safety Mode Alert Box


Safety Mode
Alert: You are about to enter Safety Mode
Safety Mode allows a person who is not a DAISEY user to enter data without having access to other functions of DAISEY. You must either Save or Submit the form to exit Safety Mode
For data security reasons, you will be logged out when entering Safety Mode. When you log back in, you will return to having full access to DAISEY.
Do not give your username or password to anyone to log into DAISEY
Enable Safety Mode
Cancel

Once safety mode is enabled, this will be indicated by a blue box near the top of the form (**Figure *25***). The form can now be filled out. Once the form is submitted, the user is logged out of DAISEY. No other data can be accessed by the person filling out the form.

Figure 25: Safety Mode Enabled



7. Environment Profiles

7a. What is Environment Data?

The *Environment Data* menu link contains a search grid of environment profiles (e.g., daycares and classrooms) that users have entered into DAISEY. These profiles are used to track environment-level data (e.g. classroom observation data), as well as which children are in each environment.

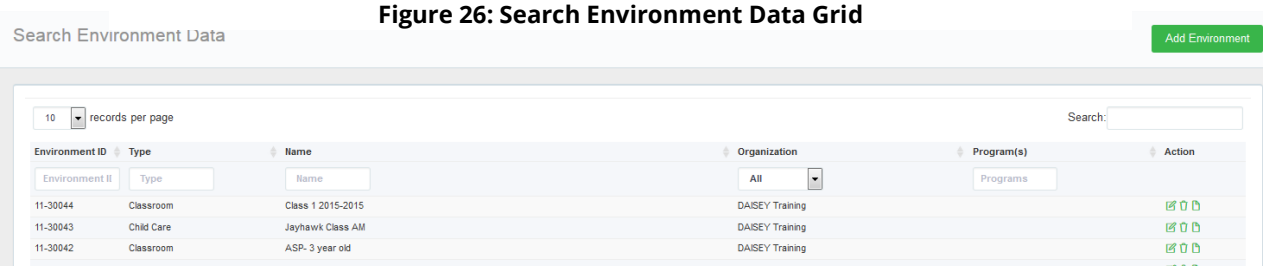
7b. Managing Environment Profiles

The *Search Environment Data* link is found under *Environment Data* in the left navigation menu. This page contains a search grid of environment profiles created by DAISEY users.

In the *Search Environment Data* grid (**Figure *26***), each row contains information specific to that environment profile:

- *Environment ID*: the ID number of the environment automatically generated by DAISEY.
    - Click the *Environment ID* to open the *Environment Activities* (see section 8).
- *Type*: what type of environment is reflected in the profile (e.g., Day Care, Classroom).
- *Name:* the user-chosen name of the environment.
- *Organization*: the name of the organization that added the Environment Profile.
- *Program(s):* program(s) an environment is associated with.
- *Action*: clickable icons allow users to perform certain actions:
    - View or edit a profile by clicking the pencil icon.
    - Delete profile by clicking the trashcan icon. Not recommended (see section 7f).
    - View the "form history" by clicking on the paper icon (i.e. when edits were made and by which user).

Figure 26: Search Environment Data Grid



7c. Adding New Environment Profiles

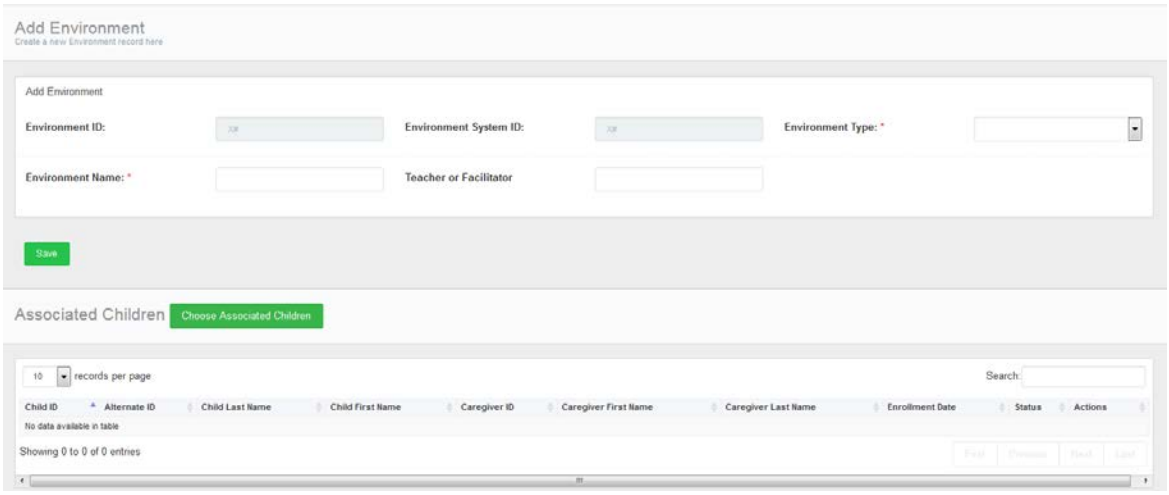
To add a new environment profile:

- Click *Environment Data* in the left navigation menu.
- Click *Search Environment Data.*
- Near the top-right corner of the search grid, click the *Add Environment* button (**Figure *26***).
- A blank environment profile form appears (**Figure *27***). Note that an organization's environment profile may contain different questions from those shown in **Figure *27***.
- Fill in all information collected on the environment.

Note: It is helpful for each group of children to have their own environment profile. For instance, if a classroom is a half-day classroom, users may find it helpful to denote this in the environment names: "Ladybug Class AM" and "Ladybug Class PM". It may also be helpful to include the class year in the name (e.g. "Ladybug Class 2015-2016").

- Mandatory fields are marked with an asterisk (*) and must be filled in in order to save the profile. Please note that each organization may have data collection requirements above and beyond those mandatory fields.
- Once all information is entered, click *Save* near the bottom of the page. An alert box will pop up that reads: "Successfully saved environment with ID" followed by the automatically generated environment ID.
- Click *OK.*

Figure 27: Creating an Environment Profile



The new environment will now appear in the *Search Environment Data* grid.

7d. Associating Children to Environment Profiles

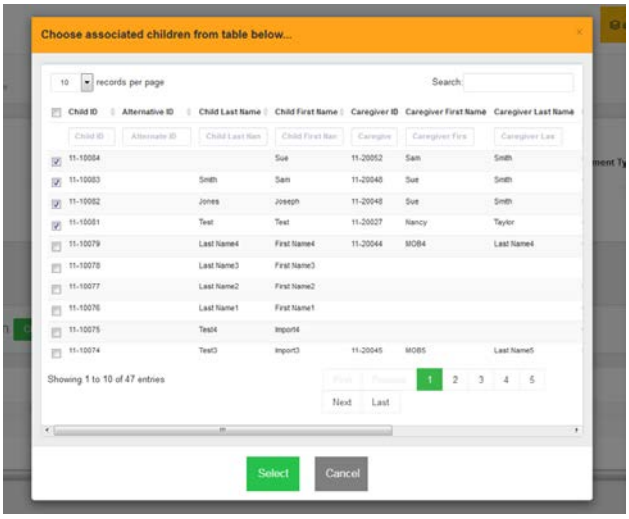
When creating or editing an environment profile, users may associate children with the environment.

Note: Child profiles to associate must be created before associating them to environments.

To associate child profiles with an environment profile:

- Click *Environment Data* in the left navigation menu.
- Click *Search Environment Data.*
- Locate the environment profile to associate children to.
- Click the pencil icon (*Edit*) under the *Action* column.
- Click the *Choose Associated Children* button near the bottom of the form (**Figure *27***).
- A search grid of child profiles appears (**Figure *28***).
- Select the children to associate with this environment by clicking the check box next to each child in this environment.
- Click the *Select* button.
- The selected children now appear in the Associated Children section of the profile.
- Click *Save* to save the newly associated children to the Environment Profile.

Figure 28: Associating Children with the Environment Profile



7e. Editing Environment Profiles

To edit an environment profile:

- Click *Environment Data* in the left navigation menu.
- Click *Search Environment Data.*
- Locate the environment profile to edit.
- Click the pencil icon (*Edit*) under the *Action* column.
- Make changes.
- Click *Save* near the bottom of the page.

7f. Deleting Environment Profiles

Note: Deleting is not recommended. Profiles created accidentally may be deleted (e.g. a duplicate).

To delete an environment profile:

- Click *Environment Data* in the left navigation menu.
- Click *Search Environment Data.*
- Locate environment profile to delete.
- Click the trashcan icon in the *Action* column.
- A prompt will appear that asks “Are you sure you want to Delete the selected form”?
- Click *OK* to confirm and delete. Or, click *Cancel* to cancel the deletion.

8. Environment Activities

8a. What are Environment Activities?

Environment Activities are data forms that are attached to environment profiles. Within *Environment Activities*, users can access available program forms for submission of collected environment-level data and view a history of saved or submitted forms. Forms available will vary between organizations.

8b. Accessing Environment Activities

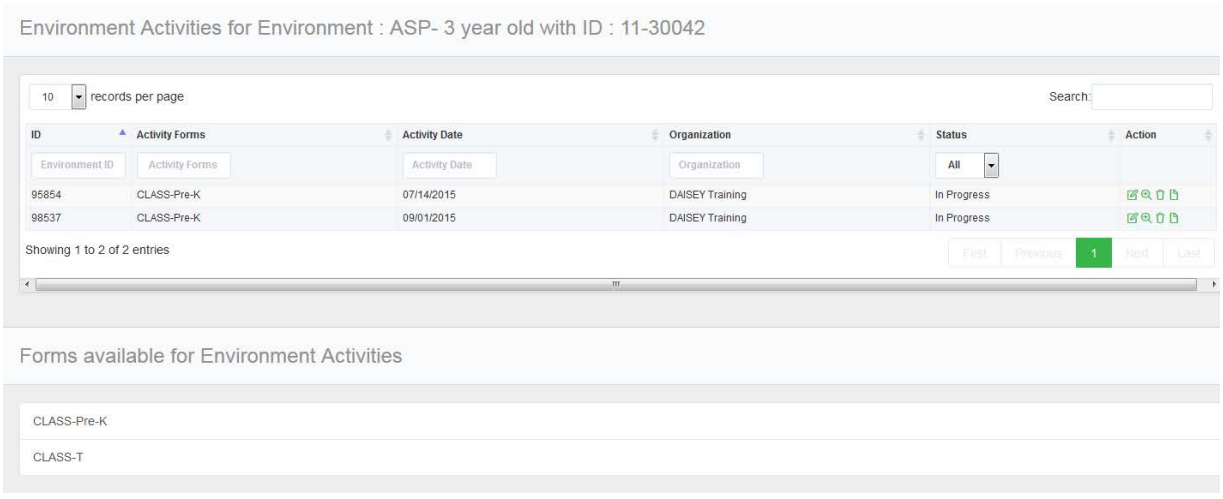
The Environment Activity Page for any environment profile is accessed through the *Search Environment Data* grid.

To view an *Environment Activity Page*:

- Click *Environment Data* in the left navigation menu.
- Click *Search Environment Data.*
- Locate the environment profile to view.
- Click the *Environment ID*.

Users will be redirected to an *Environment Activities Page* with 2 sections. *Environment Activities* and *Forms Available for Environment Activities*. (**Figure *29***)

Figure 29: Environment Activities Page



In the *Environment Activities* grid, each row contains information specific to a form filled out for this environment profile:

- *ID*: A DAISEY ID generated for this specific form.
- *Activity Forms*: the name of the activity form entered.
- *Activity Date*: the date the activity occurred (i.e. when the data was gathered).
- *Organization*: the name of the organization of the user that entered data into the form.
- *Status*: whether the form has been "Submitted" or is still "In Progress".
- *Action*: clickable icons allow users to perform certain actions:
    - View a form my clicking the magnifying glass icon. (Only an option for submitted forms.)
    - Edit a form by clicking the pencil icon. (Only an option for forms in progress.)
    - Revert a submitted form back to "in progress" for editing by clicking the arrow icon. (Not an option for Provider-level users.)
    - Delete the form by clicking the trashcan icon.
    - View the "form history" by clicking on the paper icon (i.e. when edits were made and by which user).

8c. Adding Environment Activities

To add an environment activity:

- Click *Environment Data* in the left navigation menu.
- Click *Search Environment Data.*
- Locate the environment profile to add form data to.
- Click the *Environment ID*.
- Click the name of the activity form to add from the list of *Forms Available for Environment Activities.*
- A blank form will appear.
- Fill in all collected data.
- Click *Save* to save data as "in progress" (i.e. incomplete); **OR**
- Click *Submit* if the information is correct and ready to be fully submitted.

Note: Users with the Provider role in DAISEY are unable to revert a form once submitted. Users with the Program Admin role are able to revert form status for editing if needed.

The new form will now appear in *Environment Activities*.

8d. Editing Environment Activities

To edit an environment activity form:

- Click *Environment Data* in the left navigation menu.
- Click *Search Environment Data.*
- Locate the environment profile attached to the activity form to be edited.
- Click the *Environment ID*.
- Locate the activity form to edit in the *Environment Activities* grid.

Note: Submitted forms cannot be edited and must first be reverted to "in progress".

- Click the pencil icon in the *Action* column.
- Make changes.
- Click *Save* to save data as "in progress" (i.e. incomplete); **OR**
- Click *Submit* if the information is correct and ready to be fully submitted.

8e. Deleting Environment Activities

Note: Deleting is not recommended. Forms created accidentally may be deleted.

To delete an environment activity form:

- Click *Environment Data* in the left navigation menu.
- Click *Search Environment Data.*
- Locate the environment profile attached to the activity form to be edited.
- Click the *Environment ID*.
- Locate the activity form to delete in the *Environment Activities* grid.
- Click the trashcan icon in the *Action* column.
- A prompt will appear that asks "Are you sure you want to Delete the selected form"?
- Click *OK* to confirm and delete; **OR** click *Cancel* to cancel the deletion.

9. Data Management

From the *Data Management* menu links, users can import data into DAISEY, export data from DAISEY, and view reports generated by DAISEY.

9a. Importing Data to DAISEY

This section demonstrates how to use data templates to gather and format data for importing. Some users may have an existing data system or tool to collect data on the children and families they serve. The import function is available to those users who wish to export data from their system, prepare it for importing into DAISEY, and load the data into the system. Importing data requires that users prepare their data in specific ways so it is formatted and ready for DAISEY. Data templates are available to ensure that all imported information aligns with DAISEY requirements.

Note: The import process requires that users have basic Excel skills such as copying, pasting, and formatting cells.

When users click *Import* under *Data Management* in the left navigation sidebar, three links will appear: *Import Data, Data Templates,* and *ID Reports*. Using these links, users can import data for forms and profiles.

The import process is slightly different when importing new profile forms versus importing new activities forms. The tables below show the steps in each process:

Table 1: Importing New Profile Form Data	
Step 1:	Download the *Data Template* for the specific profile form to import (section 9c).
Step 2:	Fill out the *Data Template* by entering data into the template (section 9c).
Step 3:	Save template and close.
Step 4:	Import the file to the DAISEY system (section 9d).

See section 9e for details on importing profiles.
See section 9f for how to edit and overwrite existing profiles using the import function.

Table 2: Importing New Activities Form Data	
Step 1:	Child, caregiver, and/or environment profiles must exist before importing activities data for those profiles. Profiles may be: • Entered manually (see sections 4c, 4d, 5c, & 7c) OR • Imported (see table 1 above and section 9e).
Step 2:	Download the appropriate *ID Report(s)*: child, caregiver, and environment IDs for the type of data to be imported (see section 9b).
Step 3:	Download the *Data Template* for the specific form data to import (section 9c).
Step 4:	Copy and paste ID numbers from the *ID Reports* to children, caregivers, and/or environments in the *Data Template*.
Step 5:	Complete the rest of the *Data Template* by entering data into the template (section 9c).
Step 6:	Save template and close.
Step 7:	Import the file to the DAISEY system (section 9d).

9b. Matching ID Numbers Using ID Reports

Each caregiver, child, and environment profile is assigned a unique DAISEY ID number upon creation. If a user's organization assigns ID numbers, each profile will have an alternative ID number that may be different. To successfully complete the import process, users need to use an *ID Report* to match the data to corresponding DAISEY ID numbers.

Note: Some organizations utilize an optional DAISEY feature to **share profiles with other organizations** under the same grantee. This means that users in those organizations can view profiles created by other organizations in their search grids.

At this time, only profiles created by the current user's organization will show up in their ID Report. Therefore, this report only includes profiles beginning with the same organizational ID before the dash. If such users need to import data for other profiles they have access to, they will need to **export the profile data** instead of downloading the ID Report to get an Excel list of all profile IDs viewable in their search grids. For more on the exporting process, see section 9h.

To download an ID report:

- Click *Data Management* in the left navigation menu.
- Click *Import*.
- Click *ID Reports*.
- Click the download icon (⬇) in the *Action* column to download either the *Child IDs, Caregiver IDs,* or *Environment IDs* data file.

Once the file is open, users can view all children, caregivers, or environments created by their organization (**Figure *30***). The left column contains the DAISEY ID. Users will need to enter the DAISEY ID number on the import template for any activity data.

Figure 30 : Child ID Report

Children Data					
DAISEY Auto-generated ID	Alternate ID	First Name	Last Name	Date of Birth	Enrollment Date
11-10003		Johnny	Doe	06/02/2014	05/01/2014
11-10008		Patricia	Stone	03/17/2013	06/01/2014
11-10009		Sam	Childress	07/02/2012	08/06/2014
11-10011		Robert	Owens	01/01/2010	01/22/2015
11-10013		Corbin	Redmond	05/09/2014	09/08/2014

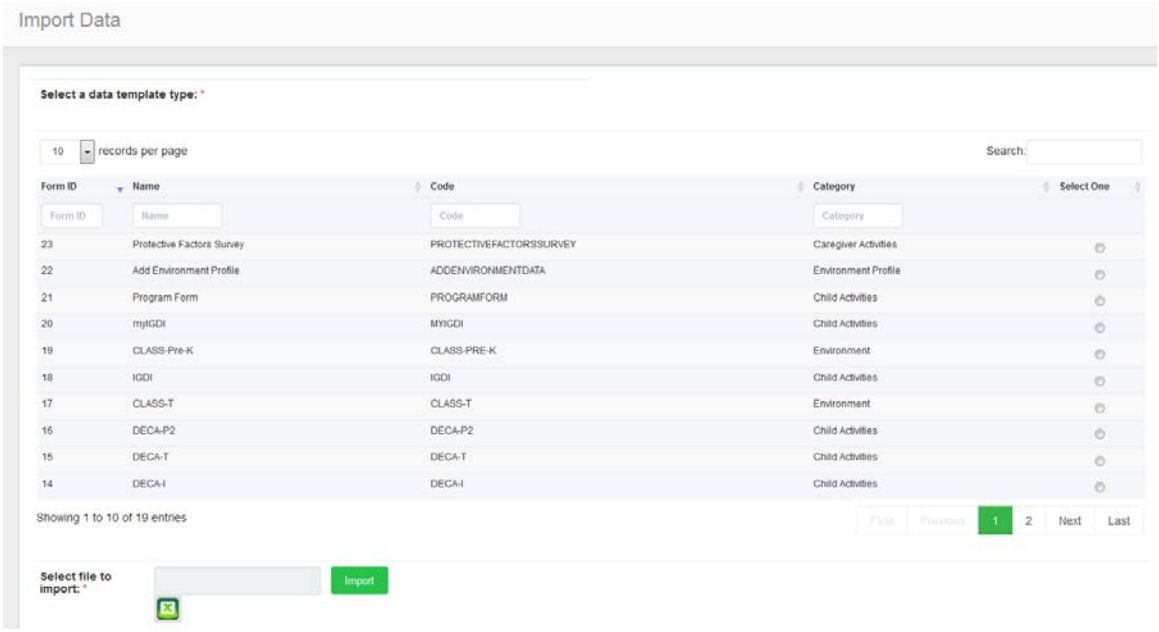
9c. Downloading Data Templates for Import

Data templates are Excel files which contain all the fields necessary to import child, caregiver, environment, and/or activities data. Clicking the *Import Data* menu link brings users to the *Search Forms* grid (**Figure *31***). The *Search Forms* grid is a list of all the templates available for importing data into DAISEY.

To download a *Data Template*:

- Click *Data Management* in the left navigation menu.
- Click *Data Templates*.
- Click the download icon ( ) in the *Action* column in the row that corresponds to the type of form to import.

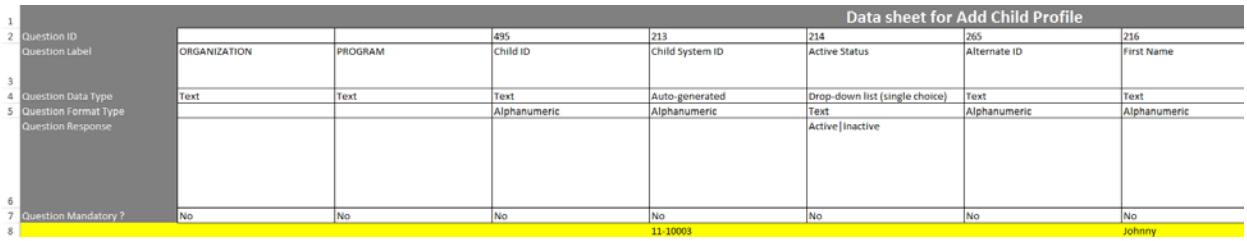
Figure 31: Search Forms Grid



The data template will contain a column for each question in the form (**Figure *32***).
Rows 1-7 provide guidance on how to fill out the form:

- Row 1 displays the text "Data Sheet for" followed by the name of the form which will be created upon importing.
- Row 2 displays the question ID for each column
- Row 3 displays the question text.
- Row 4 indicates the data type.
- Row 5 indicates the format type.
- Row 6 specifies the allowable responses for questions that appear as drop-down boxes in DAISEY.
- Row 7 indicates whether this question is a mandatory field.

Figure 32: Data Template Example



1				Data sheet for Add Child Profile			
2	Question ID			495	213	214	265	216
	Question Label	ORGANIZATION	PROGRAM	Child ID	Child System ID	Active Status	Alternate ID	First Name
3								
4	Question Data Type	Text	Text	Text	Auto-generated	Drop-down list (single choice)	Text	Text
5	Question Format Type			Alphanumeric	Alphanumeric	Text	Alphanumeric	Alphanumeric
	Question Response					Active|Inactive		
6								
7	Question Mandatory ?	No	No	No	No	No	No	No
8					11-10003			Johnny

Each row filled out beginning with row 8 (highlighted in **Figure *32***), will create a new form when imported. Note that users must have the correct format type for filled out cells (e.g. columns marked as "Date" in rows 4 & 5 must be formatted as dates in Excel) When a row has been filled out for each form to be created, save the data template in a familiar location.

One or both of these questions will be required to import *Family Activities* forms: **"Which child was involved?" and "Which caregiver was involved?"** These are marked as "dynamic" fields. Each will pull the answer from the related ID filled out elsewhere in the template. Therefore, simply provide the Child ID and/or Caregiver ID as required in the Child ID and/or Caregiver ID field and leave the "Which _____ was involved?" columns blank.

Important rules for importing data for questions with **single-select drop-down answer boxes**:

- All possible choices will be in row 6. Each choice will be separated by a vertical line(|).
- Answer must match exactly as written between the vertical bars in row 6. Extra spaces or incorrect capitalization will prevent data from importing correctly.

Important rules for importing data for questions with **multi-select drop-down answer boxes**:

- If users would like to import more than one choice, separate each choice with a vertical line. (e.g. Pre-K|Home Visiting)
- The vertical line is created on a standard (QWERTY) keyboard by holding the "shift" key while pressing the backslash (\) key.
- Hint: The answers can also be copied and pasted directly from row 6, removing any unnecessary answers and vertical lines.

Note: Unless importing new profiles (see section 9e), at least one **DAISEY Auto-generated ID is required in the template**: *Child ID*, *Caregiver ID*, and/or *Environment ID*.

9d. Importing Completed Data Templates

Note: Users cannot import activities data for a caregiver, child, or environment profile if the profile does not already exist in the DAISEY system.
To learn how to manually add profiles, review sections 4c, 4d, 5c, and 7c.
To import profiles, see section 9e.

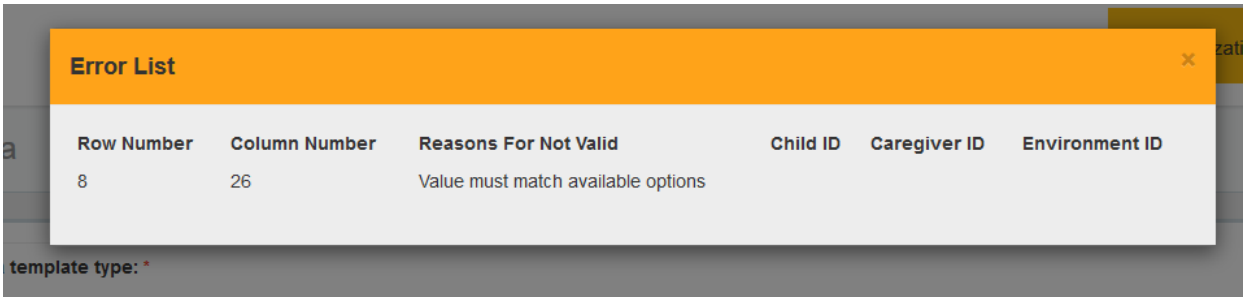
To import completed *Data Templates* into DAISEY:

- Click *Data Management* in the left navigation menu.
- Click *Import Data.*
- Use the *Search Forms* grid to find the form type to import.
- In the right-most column of the Search Forms grid, select the radio button next to the chosen template to import.
- Click the Excel symbol ( ) under the *Search Forms* grid.
- A pop-up screen will appear. Locate the prepared and saved data template (section 9c) to import.
- Select the prepared *Data Template* file, then click *Open.*
- Click *Import*.
- It may take a few moments to process the import.
- Once the processing is complete, a message will appear to the right of the *Import* button. This message will notify the user that the import was successful (**Figure *33***) or detail the errors that made the import unsuccessful.
- If no errors occurred, press *Confirm* to complete the import or *Cancel* to nullify the import.

Figure 33: Import Confirmation Prompt

- If errors were encountered during the import, an error message will appear. Click *View Details.* A dialogue box (**Figure *34***) will appear explaining the error that occurred during import, including the row and column number of the cells in the Excel data template that must be fixed before the import will be successful.

Figure 34: Import Error Notification



9e. Creating New Profiles Using Import

The import tools can be used to create multiple new child, caregiver, or environment profiles at once.

Note: If importing multiple profiles for the same family (or families), import the primary caregiver(s) first:

- If adding a child or secondary caregiver profile that will be associated to an existing primary caregiver profile, the *Caregiver ID Report* needs to be used to reference and fill in the ID of the primary caregiver (see section 9b).

To add new child, caregiver, or environment profiles using import:

- Download the *Add Child Profile*, *Add Caregiver Profile*, or *Add Environment Profile* form from the *Data Templates* grid (see section 9c).
- Fill in data in the Excel file.
- When adding new profiles, leave the *Child/Caregiver/Environment ID* column blank in the Excel form. DAISEY will generate new profile IDs when the profile data is imported.
- When finished, import the file using the *Import Data* sidebar link (see section 9d).

9f. Updating Profiles Using Import

The import tools can be used to overwrite existing child, caregiver, and environment profiles. Users **cannot** overwrite *Family* or *Environment Activities* using the import function.

To edit multiple existing child, caregiver, or environment profiles using import:

- Download the *Add Child Profile*, *Add Caregiver Profile*, or *Add Environment Profile* form from the *Data Templates* grid (see section 9c).
- Fill in data in the Excel template.
    - Use *ID Reports* to specify which profile(s) to overwrite (see section 9b).
    - Hint: Use data from a profile export to fill in data which will remain the same (see section 9h).

Note: Using import tools to edit profile data will **overwrite existing data** in DAISEY.

- Any existing profile data that overlaps with data entered in the template will be replaced.
- Any data fields left blank in the template will be imported as blanks. If only a few fields need to be updated, it is best to edit profiles manually (covered in sections 4e, 5e, and 7e).
- If an incorrect ID number is entered in the data template, data for that record will be lost and overwritten.

When finished, import the *Date Template* using *Import Data* (see section 9d).

9g. List of Common Import Errors

The following table is a list of common errors encountered while importing data into the DAISEY system. If an error occurs while importing, refer to the table in order to correct any errors before attempting to import again. Please note that this list is not exhaustive, and other errors may occur.

Error Message	Explanation
INCORRECT_FORM_ERROR_GLOBAL	The data user is trying to import does not match the current template. Please go to Data Templates to download the latest version of the form. Please ensure data begins in the second column, eighth row (B8).
INCORRECT_OR_CORRUPT_GLOBAL	User is trying to import an incorrect, deleted or dissociated form.

INCORRECT_OR_EMPTY_GLOBAL	User is trying to import an incorrect or empty form.
INVALID_TEMPLATE_GLOBAL	User is not using a valid template. Please go to Data Templates to download the latest version of the form. Please ensure data begins in the second column, eighth row (B8).
UNFILLED_GLOBAL	User is not using the correct template. Please download the appropriate template for the required form and try again.
INCORRECT_FORMAT_QUESTIONID_GLOBAL	Question ID must be numeric. User is trying to import an incorrect form.
INCORRECT_FORM_TEMPLATE_GLOBAL	User is trying to import data for a form that does not have any data. Please ensure data begins in the second column, eighth row (B8).
SELECTED_FORM_DOES_NOT_EXIST_GLOBAL	Selected form does not exist. Confirm the location of the file for upload.
UPLOADED_FORM_DOES_NOT_EXIST_GLOBAL	Uploaded form does not exist. Confirm the location of the file for upload.
FORM_WITH_MULTIPLE_CHILDID_CAREGIVERID_QUESTION_GLOBAL	A form cannot have more than one child involved or caregiver involved questions.
NOT_LATEST_FORM_GLOBAL	Form template is not latest. The data the user is trying to import does not match the current template. Please go to Data Templates to download the latest version of the form. Please ensure data begins in the second column, eighth row (B8).
NO_QUESTIONS_IN_THE_FORM_GLOBAL	The form does not contain any questions. Please go to Data Templates to download the latest version of the form.
FORM_DELETED_OR_DEASSOCIATED_GLOBAL	The form has been deleted or disassociated from the user organization.
EMPTY_CHILDID	Child ID field is not recognized or missing.
INCORRECT_CHILDID	Child ID is not found.
INCORRECT_CAREGIVERID	Caregiver ID is not found.
EMPTY_CAREGIVERID	Caregiver ID field is not recognized or missing.
EMPTY_BOTH_CHILD_CAREGIVER	Both Child and Caregiver IDs are either incorrect or both empty.
ADD_ERROR	Error adding record.
ADD_ERROR_DATA	Failed to add record.
IMPORT_SYSTEM_ERROR_GLOBAL	Unexpected error. Failed to import.
IMPORT_ERROR_GLOBAL	Incompatible file or file might have been corrupted.

9h. Exporting Data

Some users may need to extract data that has been entered into the DAISEY system and use that data within other applications (e.g. Excel, SPSS). In the *Data Management* tab, Users can export data that have been entered into the DAISEY system.

Note: Before exporting data, users may want to see if there is an *Intelligent Report* available within DAISEY that meets the user's data reporting needs (see section 9i).

To export *Family* or *Environment Activities* form data as an Excel workbook:

- Click *Data Management* in the left navigation menu.
- Click *Export.*
- In *Export Data*, locate the type of data to export (i.e. the name of the form).
- Click the radio button in the far right column to select the data for export.
- Click *Export* button near the bottom left corner of the *Export Data* grid (**Figure *35***).

Figure 35: Selecting Data Form to Export

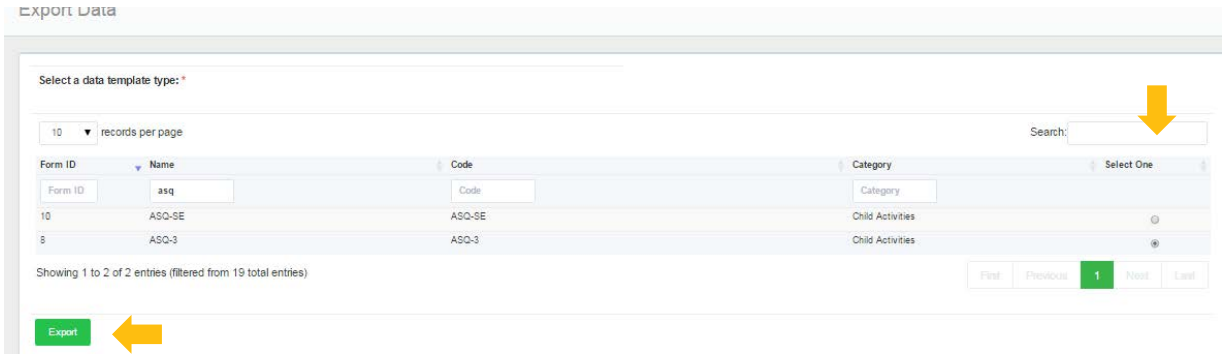


Figure 36: Export Spreadsheet

	A	B	C	D	E	F	G	H
1						Data for ASQ-3		
2	Question ID				0	0	277	273
3	Question Label	GRANTEE	ORGANIZATION	PROGRAM	Child ID	Caregiver ID	Date of Activity	Which child was invo
4	Question Data Type	Text	Text	Text	Text	Text	Date	Drop-down list (singl
5	Question Format Type				Text	Text	Dynamic Date	Dynamic Child
6	Question Response							
7	Question Mandatory ?	No	No	No	Yes	Yes	Yes	Yes
8		DAISEY Training	DAISEY Training 2		17-10005		06/01/2014	First Name6 Last Nam
9		DAISEY Training	DAISEY Training 2		17-10004		04/08/2015	First Name6 Last Nam
10		DAISEY Training	DAISEY Training 2		17-10001		10/01/2014	First Name6 Last Nam
11		DAISEY Training	DAISEY Training 2		17-10002		09/03/2014	First Name6 Last Nam

The data export will contain a column for each question in the DAISEY form (**Figure *36***). Rows 1-7 provide guidance on how to interpret the form:

- Row 1 displays the text "Data for" followed by the name of the form which was exported.
- Row 2 displays the question ID for each column
- Row 3 displays the question text.
- Row 4 indicates the data type.
- Row 5 indicates the format type.
- Row 6 specifies the allowable responses for questions that appear as drop-down boxes in DAISEY.
    - Note that for coded answers (e.g. "1,Yes|0,No") only the number will appear in the answer cells below (e.g. "1").
- Row 7 indicates whether this question is a mandatory field.

Note: If a question has changed between when a form was entered into DAISEY and when the form was exported, some answers may not match current allowable responses or some answers may be missing from newly-mandatory questions.

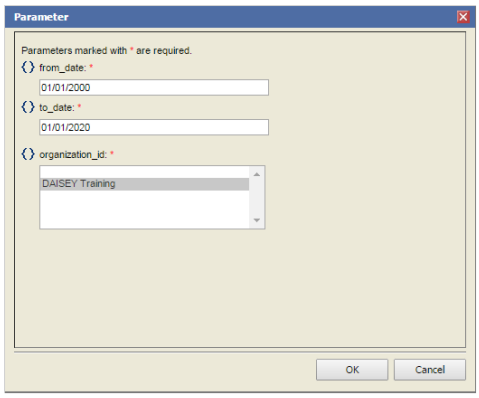
9i. Generating Intelligent Reports

Within the DAISEY system, there are a number of reports available which summarize the *Family* or *Environment Activities* data that have been entered into DAISEY. Although the list of available *Intelligent Reports* differ between organizations, the basics steps for generating each report are the same.

To view a report:

- Click *Data Management* in the left navigation menu.
- Click *Intelligent Reports.*
- Sub-menu options that appear under *Intelligent Reports* will vary.
- Once in a reports search grid, locate the report to generate.
- Click on the report name.
- A parameter box will pop up (**Figure *37***). The options in this box will vary depending on which type of report being generated. However, users always need to select a

Figure 37: Entering Intelligent Report Parameters



date range and organization(s). These parameters tell the DAISEY system to include data in the report only if the forms were completed between those dates and for the selected organization(s).

- Once all necessary parameters are selected for the report, click *OK*.
- A pop-up box will appear with a processing bar (**Figure *38***). This may take a few minutes.
- When the box disappears, a report will appear on the screen. **Figure *39*** shows an example report: Family Activity Form Completion Report.

Figure 38: Processing an Intelligent Report

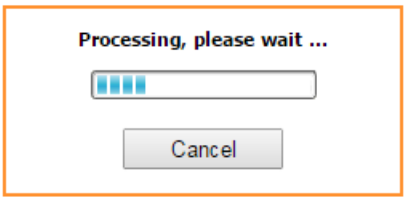
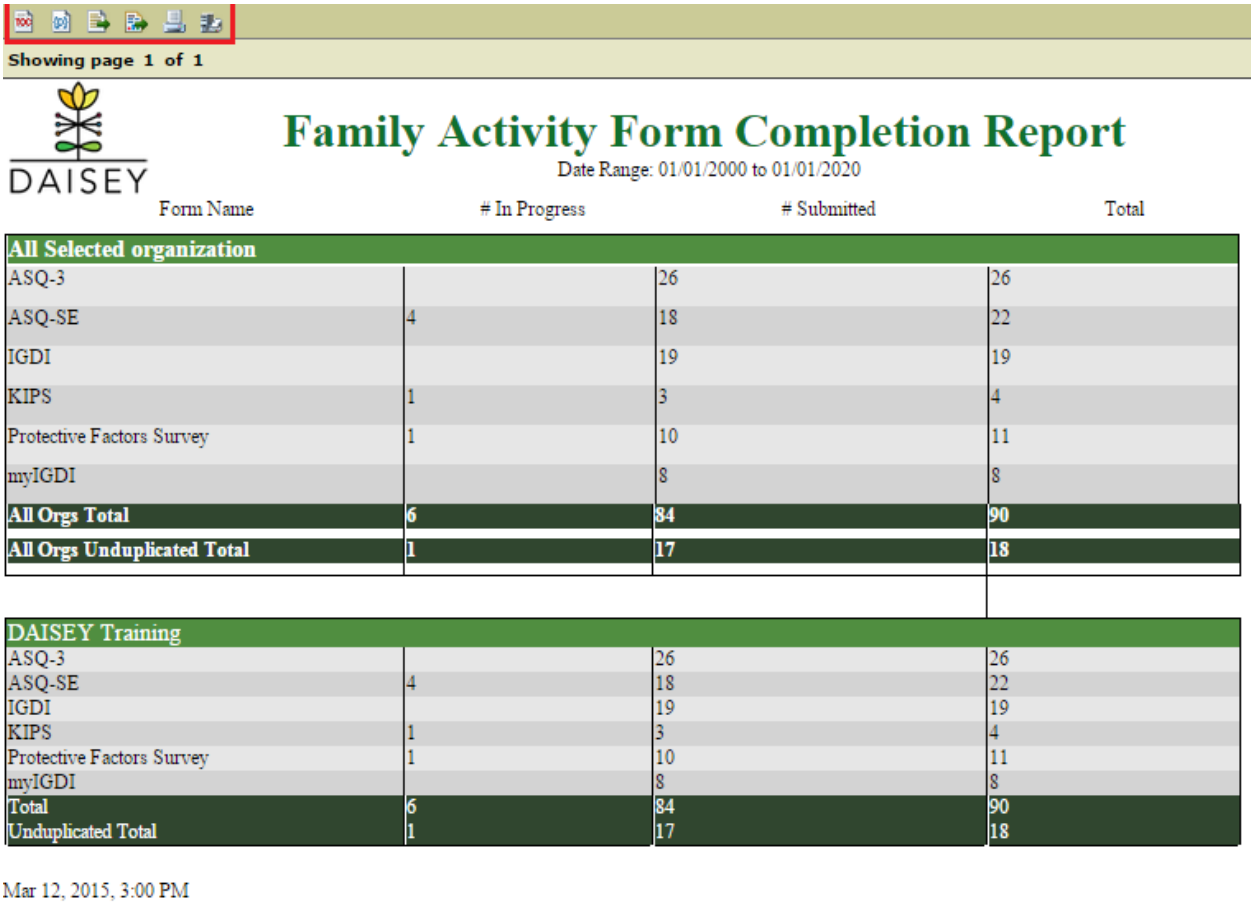


Figure 39: Example of Family Activity Completion Report



Showing page 1 of 1

DAISEY

Family Activity Form Completion Report

Date Range: 01/01/2000 to 01/01/2020

Form Name	# In Progress	# Submitted	Total
All Selected organization			
ASQ-3		26	26
ASQ-SE	4	18	22
IGDI		19	19
KIPS	1	3	4
Protective Factors Survey	1	10	11
myIGDI		8	8
All Orgs Total	**6**	**84**	**90**
All Orgs Unduplicated Total	**1**	**17**	**18**
DAISEY Training			
ASQ-3		26	26
ASQ-SE	4	18	22
IGDI		19	19
KIPS	1	3	4
Protective Factors Survey	1	10	11
myIGDI		8	8
Total	**6**	**84**	**90**
Unduplicated Total	**1**	**17**	**18**

Mar 12, 2015, 3:00 PM

- There is an icon menu near the top-right corner of each report. Hovering a mouse cursor over an icon will display the function of that button. Here are some functions that may be useful after generating an *Intelligent Report*:
    - To run the same report with different parameters (e.g. a different date range), click *Run Report* ( ).

- To export the unformatted data, click *Export Data*. ( )
- To export the report in a different format (e.g. PDF, Excel workbook), click *Export Report* ( ).
- To print a paper copy, select *Print Report* ( ).

Note: If there is no *Intelligent Report* available within DAISEY that meets a user's data reporting needs or to allow more flexibility in data visualization/summarization, users may want to export data (see section 9h) and use other programs (e.g. Excel, SPSS) to create the needed report.

Data Governance and Security

About DAISEY

The University of Kansas Center for Public Partnerships and Research (CPPR) is working with early childhood system partners to build upon existing efforts and infrastructure to ensure Kansas can effectively coordinate, improve, and track outcomes for infants and toddlers across the state. To this end, CPPR developed Data Application and Integration Solution for the Early Years (DAISEY), a web-based shared measurement tool used by early childhood system partners and funders. DAISEY consolidates data for the purpose of centralized data storage and single-source reporting. DAISEY provides the capacity to fulfill funder reporting requirements and provides access to data for reporting and analysis to improve practice and services to children and families.

Security Policies and Procedures

CPPR recognizes the sensitive nature of data in DAISEY, as well as the trust partners place in CPPR to protect that information. As a result there are extensive policies and procedures that govern all aspects of DAISEY operations. University of Kansas Information Technology (KU IT) has extensive policies and procedures relevant to DAISEY, most notably the *Data Classification and Handling Policy* , *Data Classification Procedures Guide*, and the *Security Policy*. In addition, the Center for Public Partnerships and Research established the *Data Management and Security Policies and Procedures Manual*, and the *DAISEY Policy and Procedures Manual* to bolster KU IT's safeguards.

Data Governance Documentation

In addition to established policies and procedures, CPPR works with its partners to implement data governance documentation that ensures protections and safeguards for DAISEY information at all levels.

> *Terms of Use*: between our partner and their grantees, this document establishes what data will go into DAISEY, how it will be used, and how it will be protected.
>
> *Memorandum of Agreement*: between grantees in a data sharing community, this document outlines terms regarding how shared data is used and protected.

User Confidentiality and Data Security Agreements: signed by DAISEY users, this document requires their commitment to protect data and follow DAISEY use regulations.

Because there are a variety of organizations using DAISEY, CPPR also provides support to determine appropriate avenues for documentation of client consent for data entry and data sharing in DAISEY.

Technical Specifications

DAISEY is hosted on two single use virtual servers. The servers address HIPAA Security Rule requirements for the protection of Protected Health Information (PHI). The system has the necessary safeguards in place for administrative, technical, and physical security of data to ensure the proper handling, access, storage, and recovery of PHI.

Electronic access to the system is controlled via SSH keys which encrypts information in transit. DAISEY systems are physically located in the Secure Data Center within KU's Price Computing facility. Access to equipment is controlled and monitored by staff 24/7.

If you have questions about DAISEY data governance and security or would like to request documentation referred to above, please email daiseyadmin@ku.edu.